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Message Text

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PAGE 01 STATE 005278

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FOLLOWING MESSAGE FROM STATE 10 JAN 74 REPEATED TO YOU

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E.O. 11652: N/A
TAGS: EAGR
SUBJ: EFFECT OF ENERGY SITUATION ON AGRICULTURAL PRODUCTION
AND TRADE

REF: FASTO CIRCULAR 296

1. TO ANALYZE RESPONSES TO REFTEL AND OTHER INFORMATION, FAS ESTABLISHED USDA TASK FORCE ON IMPACT OF ENERGY SITUATION ON WORLD AGRICULTURAL PRODUCTION AND TRADE. FOLLOWING IS SUMMARY FIRST TWO TASK FORCE REPORTS.

2. " U.S. AGRICULTURAL EXPORTS CONTINUE AT A HEAVY FLOW DESPITE SOME SHIPPING SLOWDOWNS AND FEARS OF FUEL SHORTAGES. TWO KEY INDICATORS- RAIL CAR LOADINGS OF GRAIN AND GRAIN INSPECTIONS FOR EXPORT--DROPPED SLIGHTLY FROM NOVEMBER'S RECORD PACE, BUT ARE STILL AT A HIGH LEVEL.

3. "THE MAJOR SHORT-RUN PROBLEM--A SHORTAGE OF BUNKERING FUELS FOR OCEAN VESSELS--MAY HAVE BEGUN TO STABILIZE, AT LEAST IN THE
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PAGE 02 STATE 005278

U.S. ONE MAJOR U.S. GRAIN TRADER REPORTS THAT U.S. SUPPLIES OF

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

Declassified/Released US Department of State EO Systematic Review 30 JUN 2005

BUNKERING FUELS ARE NOW FAIRLY STEADY, ALTHOUGH AT HIGHER PRICE LEVELS. SHIPPERS WITHOUT LONG-TERM CONTRACTS HAVE PROBLEMS, HOWEVER.

4. " OVERSEAS, THE BUNKERING SITUATION REMAINS HECTIC. CANADIANS HAVE A REAL PROBLEM IN VANCOUVER, WHICH USED TO GET MOST OF ITS BUNKERS FROM THE U.S. IF CANADIAN WHEAT SHIPMENTS ARE DELAYED OR CANCELLED, THE TIGHT U.S. WHEAT SUPPLY COULD BE FURTHER STRETCHED.

5. "FERTILIZER SHORTAGES ARE EMERGING AS THE MOST CRITICAL MEDIUM-TERM PROBLEM. WHILE THE U.S. SUPPLY SITUATION IS NOT CLEAR YET, BOTH NITROGEN AND PHOSPHATE SUPPLIES MAY BE SHORT. THE WORST PROBLEMS ARE LIKELY TO OCCUR IN DEVELOPING COUNTRIES, WHICH IMPORT FERTILIZERS--ESPECIALLY NITROGEN. INDIA'S SUPPLIERS HAVE ALREADY ANNOUNCED CUT-BACKS IN DELIVERIES.

6. " THE MAJOR LONG-RUN PROBLEM--A DROP IN WORLD ECONOMIC GROWTH-APPEARS A SHADE DARKER THIS WEEK, AS FURTHER CUTS IN FUEL ARE ANNOUNCED BY WORLD GOVERNMENTS. THE BRITISH ANNOUNCEMENT OF A 3-DAY WORK WEEK IS PERHAPS THE MOST STRIKING ACTION SO FAR."

7. ACTION REQUESTED: IN VIEW OF ABOVE, FOLLOWING DATA NEEDED IN ADDITION TO REFTEL. DATA PRESENTLY AVAILABLE IN FAS/WASHINGTON ON PRESENT WORLD FERTILIZER SITUATION IS INSUFFICIENT TO ASSESS PRESENT OR PROJECTED NEEDS AND RELATED EFFECT ON WORLD DEMAND FOR AGRICULTURAL PRODUCTS. THEREFORE, NEED TO OBTAIN, TO THE EXTENT AVAILABLE, FOLLOWING DATA ON TOTAL FERTILIZERS BROKEN DOWN BY TYPE IN METRIC TONS NUTRIENT BASIS: NITROGEN, PHOSPHATE AND POTASH FOR CROP YEARS 1971-72 THROUGH 1973-74. IN ADDITION, FOR 1974-75 WE NEED YOUR ESTIMATE OF FERTILIZER REQUIREMENTS IN ORDER TO MAINTAIN PROJECTED PRODUCTION IF SUPPLIES OF FERTILIZER ADEQUATE AND ESTIMATE OF ACTUAL FERTILIZERS AVAILABLE WITH APPROPRIATE REVISION AS AVAILABLE:

I. ESTIMATED DOMESTIC FERTILIZER PRODUCTION CAPACITY.

II. SUPPLY AND DISTRIBUTION TABLE INDICATING

1. PRODUCTION

2. IMPORTS
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3. EXPORTS

4. CONSUMPTION

5. STOCKS

III. AVERAGE FERTILIZER PRICES TO FARMERS.

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IV. EFFECT OF CURRENT SITUATION ON 1974/75 PRODUCTION AND
RESULTING EXPORT AVAILABILITIES AND/OR IMPORT REQUIREMENTS
OF MORE SIGNIFICANT AGRICULTURAL PRODUCTS.

V. IN ORDER TO HELP ASSESS FULL IMPACT OF ENERGY CRISIS ON
DEMAND FOR AGRICULTURAL PRODUCTS, NEED ESTIMATES OF GNP FOR
YOUR COUNTRY OR COUNTRIES FOR 1972 THROUGH 1974 WITH SUBSEQUENT
REVISIONS AS AVAILABLE. KISSINGER UNQTE RUSH

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